

# Early Experiences Implementing Voluntary School District Mergers in Vermont

John D. Rogers

*Washington State Department of Social and Health Services*

Talia J. Glesner

Herman W. Meyers

*University of Vermont*

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*This article describes the implementation of an initiative to encourage voluntary school district mergers in Vermont. The law was intended to increase educational opportunities for Vermont students while reducing costs. Three research activities were conducted to understand how districts and supervisory unions around the state responded to the new merger legislation, what kinds of outcomes were experienced, and what contributed to those outcomes. The methods employed include a survey of superintendents, an exit poll of voters, and an interview study of key participants in the only merger initiative to be approved during the study period. The results demonstrate strong interest in mergers among school administrators and much of the public, but there are formidable challenges to successful planning, development, and implementation of merger proposals. Successful merger plans must be responsive to the concerns of voters and compatible with the ways in which residents identify with their communities.*

The quality of public education in the state of Vermont is challenged by escalating costs and declining population. Vermont's students consistently score among the top 10 states in the country on the National Assessment of Educational Progress (NAEP) and enjoy the lowest ratio of students to teachers in the United States (Picus, Odden, Glenn, Griffith, & Wolkoff, 2012). But Vermont's per-

pupil educational cost was recently ranked as the highest in the United States (NEA Research, 2014). During the period 1997-2011, inflation-adjusted per-pupil expenditures increased by 57% (Cornman, 2013), while enrollment dropped by 20% (Rockler & Kavet, 2006; Vermont State Board of Education, 2012).

At the same time, there has been little change in Vermont's structure of educational governance since 1882 (Cyprian, 2012). In terms of enrollment, Vermont's school districts are the smallest in the United States (NEA Research, 2014). The state's 85,184 students are served by 298 school districts (Vermont State Board of Education, 2012). Most school districts are organized within 46 Supervisory Unions (SUs), which are administrative units consisting of two or more school districts, led by a superintendent and governed by a board elected by the SU member districts' boards. An additional 12 single districts and two interstate districts are administratively classified as SUs.

Amid growing concerns about educational costs and the ability of a decentralized system to equitably provide educational opportunities, in 2009 the General Assembly passed Act 153 (No. 153, 2010) to encourage voluntary

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Correspondence concerning this article should be addressed to John Rogers, Washington State Department of Social and Health Services, Research and Data Analysis Division, PO Box 45204, Olympia WA, 98504. E-mail: [jdrogers123@gmail.com](mailto:jdrogers123@gmail.com)

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school district mergers and to consolidate administrative services through joint agreements between existing SUs. The legislation also requested from the University of Vermont's James M. Jeffords Center for Policy Research (Jeffords Center) a study of the discussions, elections, and implementation of merger activities. The current article is based on the three-year study, which was designed to address the initial reactions to merger discussions and the experiences of those responsible for planning and implementing the first mergers attempted in the state.

### Related Literature

The merging or consolidation of school districts<sup>1</sup> has been a fundamental issue of education governance in the United States for most of the past century. The number of school districts across the country has declined by roughly 90% since the 1930s, and the issue of mergers has been a subject of research and debate for much of that time (Berry & West, 2010; Cubberley, 1922). The general value of district mergers has been vigorously questioned in recent as well as past years (Cox & Cox, 2010; Howley, Johnson, & Petrie, 2011; Pennsylvania School Boards Association, 2009; Sher & Tompkins, 1977), and there have even been calls for deconsolidation (Coulson, 2007; Kuziemko, 2006). However, cost savings have been documented in New York among smaller districts of 1,500 pupils or fewer (Duncombe & Yinger, 2007), and other cost function analyses have come to similar conclusions (Zimmer, DeBoer, & Hirth, 2009). In populous states where districts are already large, the prospects for mergers to reduce costs may be limited, but the value proposition is more attractive in states with small districts such as Vermont, where only 7 of 277 districts exceed 1,500 pupils (Vermont State Board of Education, 2012).

Vermont's small population is also one of the most rural in the United States. By one commonly used definition, the percentage of total population living in rural communities, Vermont (66%) is more similar to Wyoming (70%) and Idaho (65%), than it is to Maine (41%), the next most rural New England state (Rural Assistance Center, 2014). The geographic dispersion and low population of rural districts creates unique tensions between the role of schools as a locus of community identity (Lyson, 2002) and the challenge of efficiently providing high-quality educational opportunities for all students (Meyers & Rogers, 2013). The policy arguments favoring mergers have been described as an imposition of urbanization on rural schools, which are in turn problematized as inefficient and backward (Schafft,

2010; Sher, 1977). These arguments are not lost on rural voters. Several reviews of the history of merger attempts in Vermont have been compiled, and in each case the balance between local control and state intervention has been cited as a factor in the failure of nearly all attempts to consolidate districts since 1892, when the total number of districts was reduced from 2,500 to 300 (Cate, 2006; Huden, 1943; Richardson, 1994; Rosenfeld, 1977).

Although great attention has been paid to questions of the feasibility and effectiveness of district mergers, systematic accounts of implementation have only recently entered the literature, and these have mostly been limited to discussions of school consolidation. The complexity and variability of merger implementations present major challenges for the administrators and educators who must carry them out, as well as for the parents and students who must adjust to new structures and procedures. In a qualitative case study of school consolidation (Nitta, Holley, & Wrobel, 2010), teachers reported some professional benefits but also difficulties in negotiating new relationships with administrators, peers, and students. Dissatisfaction among teachers and students related to teacher reassignments was described by Howley, Howley, Hendrickson, Belcher, and Howley (2012), who also reported a gap between the more negative perceptions of students and teachers vs. the "sense of accomplishment" voiced by parents and administrators. In Maine, a program of mandatory consolidation was attempted between 2007 and 2009, but a variety of challenges resulted in the subsequent return to a voluntary system. The Maine example is especially relevant for Vermont because of that state's strong tradition of local control, its geographical proximity, and the fiscal challenges leading to its enactment. Reported challenges included skepticism about financial benefits, concerns over fairness in governance between districts of unequal size, and concerns in rural districts over potential threat to the role of schools in maintaining community identity and economic viability (Fairman & Donis-Keller, 2012).

In the context of voluntary mergers, support of the voting public and key stakeholders is an obviously necessary precursor to implementation. When public support is strong across voting communities, a vote in favor of merging may appear to be an obvious response to pressing issues (Self, 2001), but merger votes are rarely harmonious even when a measure is ultimately approved. For example, Ward and Rink (1992) described a complex mix of irreconcilable conflicts between rural communities participating in an unsuccessful merger vote. The conflicts were described as a combination of perceived self-interest (fear of higher taxes), parochialism, and concerns over loss of local identity and local control. Even when a measure is ultimately approved, the fault lines exposed by elections will remain problematic as merger plans are drafted and implemented.

<sup>1</sup> We use the term "mergers" rather than "consolidation" to reflect the practice of the Vermont Agency of Education and to distinguish the merging of districts from the consolidation of individual schools, which is not the focus of this report.

### **Enabling Legislation: Acts 153 and 156**

Vermont's Act 153 (No. 153, 2010) created a structure and incentives designed to stimulate voluntary mergers of school districts and specified certain mandatory shared responsibilities for supervisory unions. The aims of Act 153 were to improve educational opportunities throughout the state while gaining economies of scale from merged districts and shared resource management. Act 153 required all SU boards to discuss whether they wished to consider district mergers during the year following its enactment. Two types of mergers were defined. First, SU members or groups of districts could voluntarily merge to form a Regional Educational District (RED), which is a specialized type of school district or SU that is eligible to receive a set of incentives for merging. These incentives included temporary reductions in residential property tax rates, facilitation grants of up to \$150,000, and up to \$20,000 to reimburse a merger study committee for legal and consulting fees. Also, the state agreed to forgo reimbursement for state school construction aid when schools belonging to a RED were closed. Act 153 also included "virtual merger" provisions to facilitate the merging of administrative services through SU joint agreements. This provision received little attention during the study period.

Two years later, a substantial revision was passed to encourage more district-level mergers. Act 156 (No. 156, 2012) provided additional funding and incentives for transitional costs and allowed mergers to proceed without the participation of towns that voted against merging. In the original legislation, merger votes could only proceed if approved by a majority vote in each participating community.

### **Three Perspectives on Merger Implementation**

The goal of this research is to understand how districts and SUs around Vermont responded to the new merger legislation, what kinds of outcomes were experienced, and what contributed to those outcomes. The objectives as defined by the Vermont legislature were to: (1) study data and comments from school districts and SUs statewide that were discussing voluntary merger; (2) study the results of local district elections to approve voluntary merger; and (3) for mergers that occurred, study (a) efficiencies realized in terms of real dollars and operations and (b) changes in student learning opportunities and outcomes.

To address these objectives, three research activities were conducted and are reported briefly below as separate studies. First, the Vermont Agency of Education<sup>2</sup> surveyed

all superintendents to monitor compliance and to document merger activity around the state. Second, an exit poll was conducted during a local election to gain insight on voters' perceptions of school mergers. Third, a series of qualitative interviews was conducted with key stakeholders involved with the only merger initiative to be approved during the study period.

### **Early Interest, Limited Results: Survey of Superintendents and Activity Tracking**

The Vermont Agency of Education conducted an online survey of all Vermont superintendents in late 2010 to ascertain the status of merger discussions and board votes across the state. The survey was conducted to satisfy a legislative requirement that the Agency of Education report on the status of SU board merger discussions and votes. The five-question survey requested the date of the SU board meeting, the quality and outcome of the discussion, whether any district boards in the SU had discussed the possibility of mergers, and open-ended comments. Fifty out of sixty superintendents (83%) responded. All but three superintendents (94%) reported that their boards had met to discuss mergers. Thirteen (26%) indicated that their boards wished to explore the merger of districts, and another 29 (58%) reported ongoing discussions. Only 14 superintendents (28%) reported that their SU board was *not* interested. A variety of concerns were expressed in open-ended comments, including those by superintendents of SUs that were pursuing mergers. The most common concerns included a lack of information about the procedures ( $n = 8$ ), reluctance to reconsider school choice in communities without schools of their own ( $n = 6$ ), and skepticism about the likelihood of net cost savings ( $n = 5$ ). Nine superintendents suggested a variety of policy changes, such as simplifying procedures, allowing a transition period for old and new boards, and allowing districts to adopt a slower timetable.

The Agency used the survey to develop a system for tracking all merger activities associated with Act 153 (No. 153, 2010). Agency staff members maintained the records through their routine contacts with SUs. The progression of voluntary merger activities across Vermont from 2010 through 2012 is summarized in Table 1. Table 1 shows the number of SUs *initiating* key merger-related activities in each year, as a progression towards a completed merger. The paths taken by individual SUs do not always form an orderly progression from one stage to the next. For example, in 2010, one SU conducted successful merger votes, but they were followed by rescission votes in two consecutive years, with a different town reversing the vote in each case. Only two of these elections are shown in the table, as the rescission votes were not initiated by the SU.

<sup>2</sup>In 2013, the Vermont Department of Education became an Agency. For the sake of consistency we use the current designation for all references to the Agency of Education.

Table 1

*Merger Activities Initiated by Supervisory Unions*

	2010	2011	2012
Preliminary Research	12	0	0
Full Study	5	7	0
Election held	1	3	3
Merger Approved	0	0	2

*Note.* Table includes two elections conducted by the same SU in 2010 and 2011.

In its first year of implementation, Act 153 (No. 153, 2010) generated a substantial amount of activity. By the end of 2010, preliminary research had been initiated by 12 SUs, and another five had initiated formal studies. By the end of 2012, the picture had changed dramatically. Eleven studies were completed during the 3-year period, but only six proposals were put before the voters. Of these, four were rejected, and two were approved. The two successful proposals were closely linked. The first proposal allowed four districts to leave their parent SU to form a RED in an adjacent SU. In the second proposal, a new SU was formed by merging the remaining districts in the parent SU with a different adjacent SU. A detailed description of these mergers is presented in the third and final study reported below.

#### **Local Opposition to Mergers: Exit Poll of Voters**

In June 2011, the Jeffords Center conducted an exit poll of voters during a merger election in the Chittenden East Supervisory Union, a large rural area east of Burlington, VT, consisting of six widely dispersed school districts. This merger proposal was only the second to go before Vermont voters, and it provided the first opportunity for polling.<sup>3</sup> This election was thus an important indicator of the viability of future proposals and was known to be in doubt due to high levels of resistance in a single town. The purposes of the survey were to understand the distribution and strength of support for the merger proposal and to identify the perceived benefits and risks that were most important to voters.

The merger proposal was defeated in two of the six school districts. Despite a narrow majority (50.7% of all votes) in favor, the proposal did not pass because Act 153 (2010) required a merger vote to be approved by every participating school district. The election results varied substantially across the six districts, with 19% to 72% voting for the proposal.

<sup>3</sup> A previous initiative was approved by voters in early 2010, before the Jeffords Center began its work. As noted above, that merger was later rescinded in recall elections.

#### **Exit Poll Methods**

A team of eight graduate and undergraduate student interviewers was recruited from fellowship programs associated with the Jeffords Center. Interviewers were paid for their time, and all participated in a training session in advance of fieldwork. Interviews were conducted at all six polling places, with interviewers working in pairs in the most populous locations. A supervisor circulated across all of the polling places, conducting interviews in each location. Interviewing occurred during a randomly chosen time period that included half the available polling hours at each location. Interviewers were instructed to ask the first exiting voter for an interview and upon completion to approach the next available voter, continuing for the duration of the time period. Interviews were conducted in person, but respondents who wished to complete the form by writing in their own responses were allowed to do so.

Across all polling places there were 11,614 registered voters, of whom 2,465 (21%) voted in the election. Of the 2,465 individuals who voted on the merger proposal, 366 voters were interviewed, which implies sampling error less than  $\pm 5$  percentage points with 95% confidence. Interviews were completed with 75% of the voters who were approached (15% of all voters).

The survey consisted of nine questions that were selected to minimize administration time. The questions asked how respondents had heard about the merger proposal, how they voted, the strength of their support or opposition, and perceived risks and benefits of merging. Demographic questions requested age, education, gender, and whether a respondent was the parent of a student in the district. There was no question about race or ethnicity due to the homogeneity of Vermont's population (95% white as of the 2010 census).

The most important of the questions concerned the reasons for voter choices for or against the merger proposal. The first of these questions asked "Which of the following do you think will be the most important *benefit* of merging school districts?" with the response options "Save money,"

“Increase educational opportunities,” “Enhance the quality of education,” “There are no benefits,” and “Other.” The next question asked “Which of the following do you think is the most important *risk* about merging school districts?” with the options “Costs too much money,” “Loss of local control,” “Harm to education quality,” “Closure of local schools,” “There are no risks,” and “Other.”

## Results

The poll results were close to the actual vote results in all communities but included slightly more voters who voted for the merger proposals (57% of respondents vs. 51% of votes). The survey sample also included slightly more women (55%) than men (45%), which is common among surveys of this type. All analyses were conducted with unweighted data.

The responses to both questions (benefits and risks) for respondents voting for and against merging are shown below in Table 2, with percentage of the vote within each risk/benefit category. Table 2 only includes respondents to all three questions; data are missing from those who did not indicate their vote ( $n = 25$ ) and their choice of most important benefit ( $n = 11$ ) or most important risk ( $n = 6$ ). The percentages show the distribution of votes within each category.

Across all respondents, the most frequently cited *benefit* of merging was “Save money” (33%), followed by “Increase educational opportunities” and “Enhance quality” (20% for each). The most frequently cited *risk* attributed to merging was “Loss of local control” (47% of all respondents), followed by “Closure of local schools” (17%). Of the 33 “Other” responses concerning the “most important benefit” of merging (all respondents), 16 indicated expectations of

Table 2

### *Perceived Benefits and Risks by Votes For and Against Merging*

	Total N	Voted for merger		Voted against merger			
	(100%)	N	%	N	%	$\chi^2(1)$	<i>p</i>
<i>Most Important Benefit</i>							
Save money	108	73	68	35	32	6.81	.009
Increase opportunities	65	46	71	19	29	5.91	.015
Enhance quality	65	50	77	15	23	12.61	< .001
There are no benefits	61	3	5	58	95	84.24	< .001
Other	32	18	56	14	44	.00	.967
Total	331	190	57	141	43		
<i>Most Important Risk</i>							
Loss of local control	158	65	41	93	59	28.82	< .001
Closure of local schools	57	37	65	20	35	1.96	.162
There are no risks	55	54	98	1	2	46.40	< .001
Harm quality	33	15	45	18	55	1.83	.176
Other	20	12	60	8	40	.10	.752
Costs too much	13	7	54	6	46	.04	.841
Total	336	190	57	146	43		



efficiency (48%), and three made reference to equity or equality (9%). Since efficiency is not necessarily the same as cost savings, these responses were not recoded to the existing categories. The remaining open-ended responses, including those for the “most important risk,” were too diverse or unclear to categorize.

As shown in Table 2, perceptions of cost savings and educational opportunity strongly differentiated between respondents who voted for the merger proposal and those who did not. All the specific benefit categories were significantly more likely to be selected by respondents voting for the merger than by those voting against, by margins ranging from 68% for “Save money” to 71% for “Increase opportunities” and 77% for “Enhance quality” (chi-square results shown in Table 2). Not surprisingly, nearly all those choosing “There are no benefits” reported voting against merging (95%).

The only perceived risk that significantly differentiated between votes for and against merging was “Loss of local control.” The margin in this case was somewhat smaller than for the perceived benefits, with 59% voting against and 41% voting for the proposal. Although the difference is not statistically significant, concerns over school closure were indicated more frequently by those in favor of merging (65%) than by those against (35%). Demographic factors such as age, gender, education, and parental status were not differentiated by voter choice on the merger proposal. However, it should be noted that the study population was fairly homogeneous. For example, 75% of respondents were at least 45 years old, and 85% reported having completed a degree beyond high school.

## Discussion

Although the perceived benefits and risks of merging will always vary according to the circumstances of individual communities, the survey results suggest that communities with strong attachment to their local school districts will not be easily convinced on financial grounds if voters are concerned over potential loss of local control. Concerns over loss of local control were noted by more than a third of those who voted *for* the merger and were obviously the greatest single issue for those who voted against it. Compared to local control, concerns over cost, quality, and school closure did not appear to be major factors and did not significantly differentiate the vote. Proponents of future merger proposals will need a strong understanding of community-specific local control issues in order to present alternatives that are more attractive to voters than the status quo.

The primary purpose of Vermont’s merger legislation was to increase educational opportunities while realizing increased economies of scale and cost efficiency. It appears that voter perceptions in this election were in agreement

with the legislature regarding the potential benefits of merging. The most frequently cited benefit in our survey was financial savings, but the concepts of education *quality* vs. *opportunity* are abstract and may be viewed in similar terms by survey respondents. When combined, these options were identified by nearly 40% of respondents, suggesting that opportunities to learn were at least as important as cost savings.

## First Implementation of Voluntary Mergers: Interviews with Stakeholders

Three years after the passage of Act 153 (No. 153, 2010) only two linked mergers had been approved by Vermont voters. In March 2012, four towns (Landgrove, Londonderry, Peru, and Weston) voted to move jointly from the Windsor Southwest SU to the Bennington-Rutland SU, forming the new Mountain Towns Regional Educational District (RED). At the same time (May 2012) a new SU (Two Rivers) was created by merging the remaining communities of the Windsor Southwest SU with the adjacent Rutland-Windsor SU. The new administrative units became operational in July 2013. All the communities that participated in these mergers are small and rural in character. Across all three SUs, total average daily student enrollment was 2,418 in 2012 (Vermont State Board of Education, 2012). To better understand the change process, preliminary outcomes, and their implications for future merger initiatives, a series of qualitative interviews were conducted to document the process and preliminary outcomes of these first mergers to be implemented under Act 153.

## Interviewing Methods

Interviews were conducted in November 2012, in the narrow time window between the completion of preliminary budgets and the legislatively mandated reporting deadline in January 2013. For this reason we limited interview requests to a small group of individuals with central involvement in the development of the two SUs or the new RED, and interviews were not attempted with individuals who were known to be unavailable. The list included officials from the Vermont Agency of Education, the chairs of each merger committee, SU and district board members, superintendents, business managers, and consultants. Many of these individuals had multiple roles, such as committee chairs who were also board members and consultants who were former superintendents. Participants were asked to identify additional individuals who might be willing and able to contribute their experiences ( $n = 7$ ), for a total pool of 15 individuals. Contacts were made by e-mail followed by telephone calls. One person declined to be interviewed, and six could not be scheduled for interviews within the

available time period. Ultimately, eight individuals (53%), seven of whom were among the initially identified pool, were interviewed by telephone.

Seven participants were involved with implementing the Two Rivers SU, and four with the Mountain Towns RED (three of whom also participated in the Two Rivers SU). Participants included two state officials, one SU board member, one superintendent, and four consultants. The consultants had key roles in both mergers by completing the feasibility studies, financial projections, planning and meeting facilitation; each had extensive experience working in key roles within Vermont's school governance system. Two of the consultants were affiliated with the Vermont School Boards Association.

Each interview was conducted by a pre-doctoral research fellow and lasted between 30 minutes and one hour. The interviews consisted of six semi-structured and open-ended questions: (1) Tell me what happened? (2) What did not happen as expected? (3) Knowing what you know now, what should have happened? (4) Moving forward, what can we anticipate? (5) Is there anything else that you have not shared that you would like to? (6) Who else might you suggest we speak to? Participants were asked to keep in mind the priorities of Act 153 (No. 153, 2010) while answering, specifically regarding its intended effects on educational opportunities and expenditures.

After the interviews were completed, content related to the study objectives was transcribed and organized as a matrix according to the interview questions. Data were coded to identify emergent themes, reviewed by the research team, and refined iteratively. Coding and analysis followed an iterative process (Creswell, 2007; Marshall & Rossman, 2011). An initial set of codes was developed from the research goals and our literature review. The codes were adjusted after preliminary review and discussion among the research team, to resolve disagreements and to incorporate emerging information about the ongoing merger process. Thematic examples were selected on the basis of frequency across multiple participants and relevance for future merger initiatives in Vermont. Preliminary report drafts were provided to all participants as a check on accuracy and appropriateness of reported data and conclusions; several valuable responses were incorporated into the final report. Due to the linked nature of the two mergers and the overlapping roles of some participants, both accounts are combined in the results presented below.

## Results

Nearly all the participants (seven of eight) described the complex relationships and history that led up to the two mergers. The four towns that merged to form the new RED shared a single SU school for K-8 students. The high school

students had school choice but no local high school. Most chose to attend an independent high school in a different SU. There was a history of disagreement between these towns and their existing SU, which was viewed by some as dominated by the interests of a larger, neighboring town. Since most students attended different high schools, alignment of curriculum, transportation policy, and budgeting were continuing challenges. The Bennington-Rutland SU had indicated that it was prepared to accept a single merged district but was reluctant to move forward if it meant accommodating four different school boards.

A major consequence of the district-level merger's moving forward was that the remaining towns in the Windsor Southwest SU were faced with a significant loss of revenue. A merger with the Rutland-Windsor SU offered an attractive solution, and the results of research conducted by the study committee indicated that merging could result in substantial savings for both SUs while offering new opportunities to streamline administrative procedures, as well as the hope that at least some of the savings could be used to strengthen local schools. In combination, the two merger proposals offered a solution to challenges that had been debated for decades in all the participating communities.

The participants were unanimous in describing the merger process as lengthy, complex, and interpersonally challenging. For most, these challenges exceeded initial expectations, and their resolution was described as a significant accomplishment. One participant described the difficulty of working between committees and community as follows.

One thing that might be missing in the process is a community level values clarification. A dialogue about what opportunities might be out there for kids, because when we work with the committees themselves and try to triangulate that with the community that's where the breakdown occurs. When it gets to the community level it almost feels like a sales job rather than a dialogue.

Since no mergers had been previously completed under Act 153 (No. 153, 2010), there were numerous procedural challenges for which new solutions had to be found. The coordination of multiple organizations proved to be time-consuming, involving the state Agency of Education, task groups and committees for each of the two transitions, four school district boards, and three SU boards. All participants agreed that the planned one-year time frame was overly optimistic, and future merger initiatives would be well advised to allocate extra time for each step of the process. A timeline of major events is shown in Table 3 below.

Half the participants ( $n = 4$ ) took note of the effectiveness and importance of the financial planning

Table 3

*Timeline of Key Events*

Key Event	Approximate Date
Two decades of conversations around merging, including consideration of the Mountain Towns joining the Bennington-Rutland SU prior to the passage of Act 153.	1989 – 2009
Act 153 enacted	January 2010
Development and release of Template by the State Agency of Education	August 2010
Initial kickoff meetings to formalize the process defined by Act 153.	September 2010
Joint Agreement Committee formed for both SU boards	January 2011
Task Group (Planning Committee) established by both SU boards	December 2010
Formation of committees for transition and implementation	August 2011
Meetings for review and approval of draft documents and budgets	August 2011 – Present
Town Meeting election for Mountain Towns RED, advisory vote on SU merger	March 2012
Act 156 enacted	May 2012
Receipt of state funding incentives	December 2012
Launch of new educational agencies	July 2013

provided by consultants in demonstrating the feasibility of merging. There is little commonality of accounting and data management procedures across different districts and SUs in Vermont. The development of a statewide, common chart of accounts was mandated by Act 153 (No. 153, 2010) and is under development by the Agency of Education, but implementation is still in process. One participant noted that the preparation of financial projections using common metrics resulted in understandable forecasts that could form the basis of systematic evaluation and was a critical component of the plan's acceptance. Most ( $n = 6$ ) noted that despite initial optimism that the merger would lead to cost savings in the near term, there were indications that the savings would be lower than anticipated.

There was also broad agreement among participants about the importance of leadership and cooperation at multiple levels. Although all described the negotiations as challenging, most ( $n = 5$ ) also noted the importance of leaders who kept the dialogue going and worked to engage community members across a wide spectrum of personality styles and levels of engagement:

It requires people to lead the process whose force of personality, style, wisdom, and kindness have to inspire others... this is education, everything is fraught with process. You need a visionary leader to make it happen.

The board members are being great about being cooperative, flexible and thoughtful. Some financial surprises are not as good as people hoped, but the general spirit is that we're in this together, we're going to get this done and we're going to make it a really great SU.

Table 4 provides a summary of the most frequently described challenges and the responses that participants cited as most effective across both mergers.

In the SU-level merger, concerns about the potential loss of local control presented serious challenges to smaller communities that risked losing representation due to insufficient board representation. The solution, adoption of a 60% majority vote requirement for employment of the superintendent and the annual budget in the newly combined/merged SU, made it possible for these board members to have a meaningful voice in representing their communities.

A majority of participants ( $n = 5$ ) commented on the uniqueness of the district-level merger as an important factor in voter approval. As noted above, all four towns already shared a single K-8 school, each district already paid for high school students to attend the school of their choice, and most high schoolers were already attending a school in their new home SU. The merger posed no threat of school closure and no challenges regarding the transfer



Table 4

*Challenges and How They Were Met*

Challenge	Response
Differing interpretations of laws	<ul style="list-style-type: none"> <li>• Consultation and collaboration between boards and Vermont Agency of Education</li> </ul>
Inconsistent documentation/coding of financial data	<ul style="list-style-type: none"> <li>• Financial analysts worked to place financials on consistent frames of reference</li> </ul>
Logistics of merger transitions regarding pre-existing commitments such as retirement and insurance contracts	<ul style="list-style-type: none"> <li>• Funds had to be redirected, representing unanticipated merger costs</li> <li>• Public communication that schools would not close and there would be no loss of school choice in the Mountain Towns RED</li> </ul>
Concerns of losing local control were a continuing focus of public discourse	<ul style="list-style-type: none"> <li>• Use of language that did not include ‘merger,’ creation of new SU with unique name not related to either SU</li> <li>• Establish voting requirement of 60% majority for superintendent and budget (Two Rivers SU)</li> <li>• Leadership focus on reinforcing dialogue rather than debate</li> </ul>
Political climate impacting community discussion	<ul style="list-style-type: none"> <li>• Advisory votes in advance of merger proposals</li> </ul>

of real estate, minimizing the issues of local control that marked previous merger initiatives in Vermont.

Both the merger initiatives were characterized in highly similar terms with respect to their complexity, the challenges of shifting political relationships, the importance of leadership, and the value of thorough financial planning. The theme of local control was evident throughout, as a motivating force behind the Mountain Towns RED merger and as a key challenge in the Two Rivers SU merger. Although the issues of educational opportunity and economic efficiency were discussed in both contexts, there was relatively more discussion of educational opportunity regarding the district-level RED merger. The desire to align the K-8 curriculum to the high school attended by most students (as opposed to the high school attended by only a few) was described by all participants who discussed the RED merger in specific terms ( $n = 4$ ). Responses concerning the SU merger were more likely to include discussion of cost efficiencies ( $n = 6$ ).

### Discussion

As the new budgets were prepared (after the completion of the interviews reported here), there were indications that initial transition costs would be greater than expected, and

the full amount of predicted savings may not be realized for some time. For example, liability insurance coverage had to be retained for several years after the closure of the old SUs, a cost that was not anticipated in the planning study. Additionally, the role of grant funding has been a particular challenge to budget forecasting. Most notably, federal IDEA-B funding can fluctuate substantially over time. The Two Rivers SU projections included carryover amounts of unused IDEA-B funds, which were available for FY 2014 but could not be used to project the amount of available funding in future years. Some observers had expected that the 2014 assumptions would continue into future years. The different uses and accounting of grant funding across districts constitute an important factor in projecting financial outcomes and should be thoroughly analyzed in advance of planned mergers.

The originally projected annual savings included \$481,379 from the merger of two SUs, \$158,381 from merging four districts, and \$63,671 from the SU that became the new home for the merged districts, for a total savings of \$703,431. As noted above, participants described expectations that some but not all of the projected savings would be realized in the initial years of the merger, consistent with expressions of concern recorded in the minutes of transition board meetings (Wilson, 2012a, 2012b). However,

based on the published approved FY 2014 budgets of the two post-merger SUs, it appears that considerable savings have been realized in the first year. The combined projected expenditure for both post-merger SUs was \$4,018,964—a decrease of 8% from the \$4,383,521 reported in 2013 by the three pre-merger SUs combined.

At this early stage of the process, participants could say little about the effects of merging on educational opportunities. Projected benefits described in Planning Committee notes (Moyer, 2011) include improved professional development for teachers, expanded afterschool activities, more comprehensive special education services, better use of assessment data, improved technology infrastructure, more efficient use of instructor time, better coordination with the technical centers, and faster implementation of new curriculum standards. Educational opportunity gains anticipated from the school district merger included elementary curriculum alignment to the high school that most students already attended and preservation of school choice. However, no provision was made to systematically measure any of the anticipated benefits.

Although participants were optimistic about the success of the new SU and RED, a commonly voiced sentiment was that voluntary mergers are unlikely to proceed in many other parts of Vermont given the scope of the challenges that were experienced even under favorable conditions. Nevertheless, the experiences of the Mountain Towns RED and Two Rivers SU may demonstrate the feasibility of merging while providing useful guidance for other districts and SUs that take on the challenge.

### General Discussion

Vermont's initiative to encourage voluntary school mergers is not likely to achieve the results intended by the legislature. Despite the early interest of superintendents and school boards in considering mergers, only a small number of merger proposals came before voters in the first three years, and only two of those were approved. Furthermore, the only initiatives to be successful involved unusual situations in which there was no risk of school closure and little, if any, loss of local control. Paradoxically, the reported experiences of actually implementing a merger have been mostly positive despite the considerable challenges. The effective leadership and collaboration described by interview participants appear to have successfully united the participating communities, and the combined budgets suggest a net savings to taxpayers in the first year.

The early interest of board members and officials in mergers appears not to have been shared by the voting public. In addition to the four proposals that were rejected by voters, at least three others were shelved due to lack of public support or because the study committees could not

reach consensus. Potential explanations include (a) failure of education officials at the state and local levels to effectively communicate potential benefits of merging, (b) divergent priorities between education officials and the public, and (c) divergent priorities within the electorate. Although it is possible to imagine a scenario in which a merger proposal offering *no* plausible benefit might come before the public, it is unlikely that such a proposal would pass the scrutiny of a study committee, local boards, and the State Board of Education. The results observed to date suggest that all three of the above explanations have contributed to the limited adoption of voluntary school district mergers in Vermont. Public communications about mergers have mostly been in the form of town meetings, often attended by state officials, and op-ed articles in local newspapers or websites. In the exit poll, fewer than half of respondents said they had heard about the merger proposal from the district or SU, with the majority having heard about it from the news media than from any other single source. There has been little evidence of local community leaders' becoming enthusiastic champions of mergers.

The challenge of implementing voluntary mergers in Vermont may be rooted in a conflict of values. Perhaps more so than in any other state, local control is a defining value for Vermonters (Innes, 1992; Council on the Future of Vermont, 2009). There is no county-level government, and the state's Agency of Education has little authority over educational governance or quality standards. Especially in smaller rural communities, schools are often regarded as the focal point of community identity (Howley et al., 2012; Ward & Rink, 1992). Yet concerns have persisted over the equity of educational opportunities available to students in such a diverse system. There is little consistency in academic standards across the state, and consequently performance on achievement tests is highly variable (Meyers & Rogers, 2013). Faced with an apparent choice between community identity, fiscal responsibility, and the need to provide a 21st-century education for their children, it is not surprising that Vermonters find difficulty reaching consensus.

Despite the seeming intractability of the problem, much is known about the ways in which challenges to collaboration across communities can be successfully negotiated. In addition to the technical challenges of creating accurate financial projections and logistical planning, merger committees may need a better understanding of how voters identify themselves as members of their own and neighboring communities. To the extent that the difficulty can be attributed to conflicting social identities as suggested by Ward and Rink (2002), a valuable approach with extensive empirical support may be found in the Common Ingroup Identity Model (Dovidio, Gaertner, & Saguy, 2009; Gaertner, Mann, Murrell, & Dovidio, 1989). This model proposes that intergroup relations can be improved

by understanding and applying fundamental psychological processes of categorization (Tajfel & Turner, 1979) so that members embrace a superordinate common identity. This process is completed by systematically redefining perceived boundaries to redefine who is considered to be an ingroup member, creating a common sense of “we.” Dovidio et al. (2009) advocate planning that includes positive, cooperative interactions that preserve dual identities, recognizing the history and value of original group memberships. There are undoubtedly challenges to such a strategy, not least of which is the need to ensure that building a common identity does not divert attention from existing inequities or underlying conflicts. But the experiences in Vermont to date suggest that merger plans are more likely to succeed if they include systematic efforts to build new community identities over time before asking for voter support.

Concerns over local control may also be a source of strength for merger proposals. Board representation is not the only way for parents and community members to participate in their local schools. Parental school involvement is well established as a major factor in academic success (Barnard, 2004; Fan & Chen, 2001; Hill & Tyson, 2009). A merger initiative with sufficiently strong provisions to increase the involvement of parents and community members could serve to increase actual and perceived local control, if the involvement extended to meaningful participation in school governance. For example, managing parental involvement as a *partnership* (Christenson, 2004) has been advocated as a way to achieve collaboration between parents and administrators as well as teachers. In the context of special education, Butera and Costello (2010) reported that educators were more likely to advocate for changing school procedures on behalf of families after participating in a professional development course on developing parent partnerships. If a partnership model is directly responsive to the voices of parents (and by extension to the community in general), it may offer a strong alternative to local control through an elected school board.

The current results are subject to several important limitations. First and most importantly, the exit poll and interview data represent single and dual merger initiatives, respectively. Anecdotal reports from state and local officials, teachers, and study participants during the 3-year research period made it clear that every initiative has a different story and a long history in the affected communities. Although we believe our conclusions have general utility, the experiences upon which they are based are certainly specific to the communities that we studied. Second, the qualitative interview results are based on a small sample of key stakeholders. A broader pool of participants would have yielded a richer and more informative data set, and it

would have been especially desirable to include parents and students. However, the scope of interviewing was limited by our need to capture as much of the process as possible before the legislatively mandated reporting deadline. Third, the slow pace of adoption meant that it was not possible to address the financial or educational outcomes of the implemented mergers during the study period. Nonetheless, the results provide a preliminary description of the processes, issues, and planning that communities must navigate before voluntary school district mergers can even begin; they also demonstrate the importance of directly addressing the fundamental concerns of the voting public in addition to demonstrating the utilitarian value of merger proposals.

This study makes several contributions to the existing scholarship in rural education research. First, it highlights the continuing importance of local identity in the implementation of rural education policy while suggesting the possibility that local control and equity of educational opportunity need not be conflicting priorities. Second, it demonstrates the value and importance of measuring community perceptions of major policy changes through inexpensive, locally focused exit polling methods that are demonstrably representative of voters in the involved communities. A third contribution is to illustrate the need for a deeper understanding of how to plan mergers and best practices for implementation after a decision has been made to move forward. There has been much research and discussion of whether mergers are good for students, families, and their communities, but little of it has resulted in effective guidance for schools, districts, and state agencies faced with the task of carrying them out.

Several avenues of new research would be valuable for guiding new merger initiatives and better understanding those that have already been implemented or are currently in progress. First, there is a need for more systematic public opinion research on the perceptions of voters and parents regarding the approval and implementation of mergers. Many case studies have been presented, but findings based on representative population samples are scarce. Second, there is an inadequate base of theory-informed evidence to help guide officials and board members in crafting merger plans that forge new social structures to strengthen rather than threaten the community ties of those they serve. New approaches need to be developed, systematically tested, and effectively disseminated. Finally, there is little consistency in how different communities and states define and measure the potential benefits of merging. Particularly with respect to “educational opportunities,” there is urgent need for well specified measures and systematic, representative data collection that does not place undue burden on teachers and school administrators. Without effective measurement, it would be difficult to effectively implement any policy

designed to improve educational opportunity; and there will be little reason for the public to support merger initiatives in the absence of a more compelling rationale.

In every year since the passage of Act 153 (No. 153, 2010), bills that would impose mandatory mergers have been introduced and rejected. During the 2014 Vermont legislative session, the Vermont House passed a bill that would have eliminated SUs and required all districts to consider mergers and to reach a decision on the matter by 2020 (Vt. H.883, 2014). Districts failing to take action on their own would have been reassigned by the Legislature to a greatly reduced number of merged “expanded districts.” The Senate, however wanted a less coercive approach, and attempts at compromise failed. As in previous years, the issue of rising property taxes provided early impetus, but the issue of local control emerged as the driver of debate.

Rural states seeking efficiencies and opportunities through voluntary school district mergers face a unique challenge. The available research suggests that cost efficiencies are possible, at least for smaller districts (Duncombe & Yinger, 2007), but the complexities of individual cases imply that mergers should be voluntary rather than mandatory (Cox & Cox, 2010; Fairman & Donis-Keller, 2012; Spradlin, Carson, Hess, & Plucker, 2010). However, the challenges of designing a merger plan that will gain the approval of the public and the participating boards are daunting. Once a merger has been approved, it appears that the challenges of implementation may be easily underestimated even after years of careful planning. Continuing and future efforts would benefit from a broader base of knowledge concerning best practices for planning and implementing voluntary mergers, additional research on methods for developing community participation and support, and a deeper understanding of the critical role of schools in the connection between rural residents and their communities.

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